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ABSTRACT

Addressed to arts organizations and public school districts, this guide comprises questionnaires and work sheets for step-by-step planning to use surplus schools for arts projects. An introduction alerts planners to the complex forces involved in reuse of surplus school space and outlines four common planning situations: an arts group actively seeking new space; an arts group alerted to a surplus school; a school building reuse committee investigating alternative uses for surplus facilities; and a community arts consortium broadly interested in improving the arts locally. Each chapter's questionnaire forms are introduced with reference to these varying scenarios. Included are forms for assessing the project's goals and problems, profiling the arts organizations involved, establishing space and location needs, profiling the school building, selecting programs and activities, testing the fit between space and program alternatives, computing space operating and maintenance costs, and summarizing space evaluation. (MJL)

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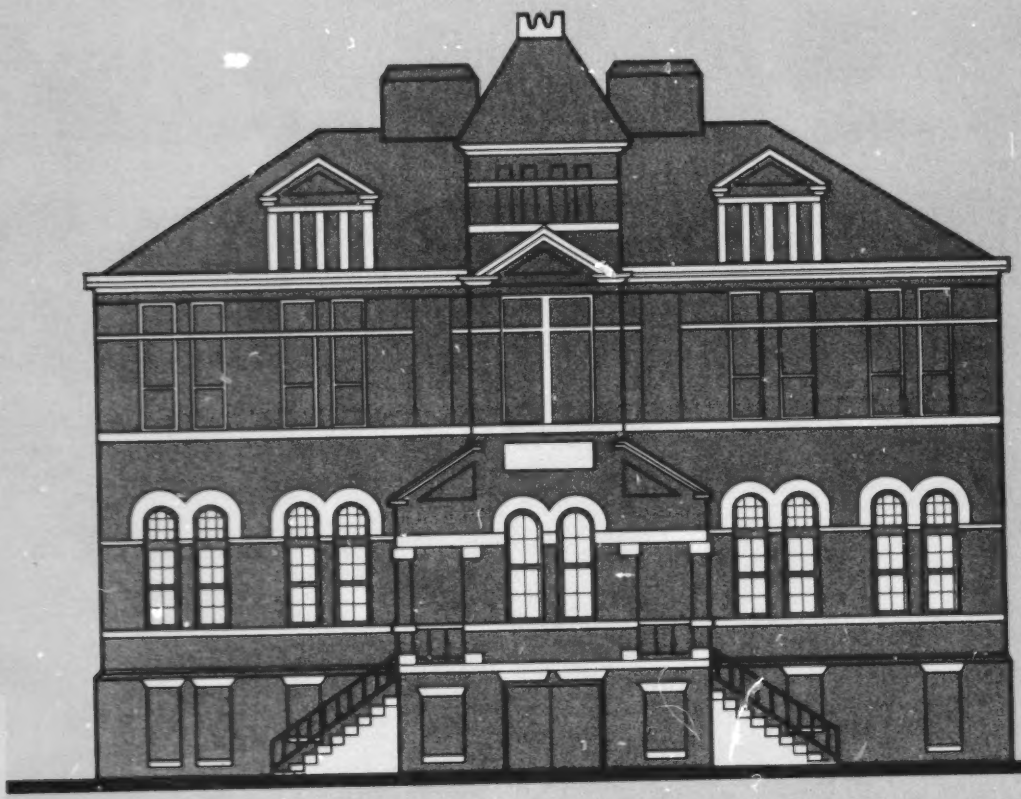

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PUTTING

THE ARTS IN SURPLUS SCHOOLS

A PLANNING WORKBOOK

Developed by Educational Facilities Laboratories
a division of the Academy for Educational Development

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680 Fifth Avenue
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Supported by a grant from the Design Arts Program, National Endowment for the Arts.

August 1982

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FOREWORD

This "planning assistance kit" has been prepared to help arts organizations and public school districts take advantage of an opportunity -- surplus school space. At the same time that many school districts are coping with the problem of reduced enrollments and too many school buildings, community arts groups are trying to find inexpensive, well-located, and appropriate space for their programs. Former schools, and sections of underused schools, will often be ideal.

The kit has two parts. The Arts in Surplus Schools, originally prepared for the Arts Edge Conference held in Pittsburgh, October 1981, and supported by the Design Arts Program, National Endowment for the Arts, is a collection of ideas and examples of successful arts programs in surplus schools. The Workbook, Putting the Arts in Surplus Schools, contains step-by-step guidance to help an arts organization or coalition, or a school district reuse committee, plan a "school reuse for the arts" project. It deals with defining needs, searching for partners, assessing potential schools, determining fit, analyzing costs, and many other details that must be thought through carefully. The Workbook is supported by a grant from the Design Arts Program, National Endowment for the Arts, with complementary support from a variety of sources. Sections of the Workbook were tested in planning efforts in communities such as Glen Ridge, New Jersey; Washington, D.C.; Huntington, West Virginia; and Flint, Michigan under a variety of auspices. Its dissemination to arts and education groups is being assisted by the National Information Service of Arts, Education and Americans, Inc.

Putting the Arts in Surplus Schools was developed by EFL's Ellen Bussard and Alan Green, assisted by Beryl Fields. EFL/AED is deeply appreciative of the support provided by NEA and the array of other organizations and individuals.

Our hope is that by using the kit, more arts endeavors and organizations in more communities will find a home in surplus school space, to the mutual advantage of both the arts and the schools.

Educational Facilities Laboratories
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INTRODUCTION

Public school space has become available for other uses in the past decade as a result of declining and shifting student enrollment in large and small communities across the country. More school space, including more junior high or middle school and high school buildings, will be available in the coming decade as the declining enrollment trend works its way through the upper grades.

School buildings have been closed, and sold or leased in their entirety for new use as apartments, offices, studios, or retail space. Buildings have been turned over to mixed community uses that include recreational, municipal, social service, library, and arts components; and representative governing boards have administered these community school centers. Portions of some school buildings have been leased to non-school users, while the public school continues to operate at a reduced size in the same building. In the last case, non-school users are often sought who can support or enrich the school's normal program.

The arts are represented in all three types of surplus school space reuse -- whole buildings, sharing with community services, and sharing with schools. The booklet included as part of this kit -- The Arts in Surplus Schools -- documents a wide range of exciting arts reuses of surplus space and highlights many of the issues involved in successful reuse. The booklet provides names, addresses, and telephone numbers for contacting the arts groups featured.

This workbook part of the kit -- Putting the Arts in Surplus Schools -- provides planning materials to help artists and arts organizations make use of surplus school space. The workbook is also designed to help school building reuse committees explore the feasibility of arts reuse.

A Word About Surplus School Reuse

Most arts organizations and artists (and many other community members) are not particularly aware of the chronology of events, cast of characters, or structure and limitations of closing and reusing all or parts of schools.

The Board of Education, or School Board, which is usually an elected body --

but may be appointed -- has responsibility for operating the public schools in the school district. (A school district, by the way, may have the same boundaries as a county, town or village, or may have boundaries that include parts of several towns.) The school board's responsibility extends to determining the building space needs for the district -- whether schools are overcrowded and more space is needed or whether schools are underused and less space is needed.

The school board decides whether to close schools, or parts of schools, and which ones to close. In many districts public input is sought through citizen advisory committees and public discussion of interim reports, as well as through legally mandated public hearings. Often, once a decision to reduce school space has been made, alternate uses of specific schools are considered as part of the process of deciding which school(s) to close or reduce. An appointed citizen advisory committee may seek suggestions and letters of interest from potential reusers at this point. Tentative plans for reuse may be developed as part of its recommendations. Because school closing tends to evoke loud public debate, arts groups are likely to know when schools are being considered for closing or reduction.

The time lapse between deciding to close or reduce a school, and carrying out the plan at the end of a school year can range from a couple of months to over a year. The further step of deciding on and implementing reuse can take almost no additional time, if reuse planning occurs before the closing, or it can take years, if the district is undecided about what to do or holds out for a lucrative sale. Various legal complications, described below, can also contribute to a long period when buildings sit idle.

Several routes are available for officially closing a school and determining alternate uses. The route used in any community will depend on the motivations and concerns of the school board regarding possible future need for recommissioning a building as a school, and on the legal relationship between school districts and municipal governments regarding building disposition. The laws of each state establish relationships between school districts and municipal governments regarding school buildings.

In some states where school district and municipal boundaries coincide, the municipal government becomes the owner of a school building once it is officially declared surplus. The municipal government then controls the future of the building. Under this arrangement, if school board members feel they may need the building again as a school or if they want to continue to use playing fields or parts of the building, they may refrain from officially declaring it surplus in order to retain control. Nevertheless, they may close the building and seek to rent the unneeded space. If the building is declared surplus, and ownership reverts to the municipal government, it may seek to either rent or sell the building, in line with its priorities. In "fiscally dependent" school districts, where the public schools' funding is part of the municipal budget, and where the municipality is therefore responsible for future new school construction, the municipal government may also prefer to rent a building rather than to sell it.

In the second common arrangement, the school district is an entirely autonomous government, with its own tax base and total control over its property. (This is the case in all districts where boundary lines do not coincide with

municipal boundaries.) When the district closes schools, the school board retains ownership and responsibility for disposition. It also has the responsibility of maintaining the buildings whether they are in use or empty.

State laws further prescribe procedures school districts or municipalities must follow in selling or renting surplus space, at times prohibiting sale or rent at less than "fair market value," or restricting permissible length of leases or eligible users.

In addition, community residents, and especially those living nearest a school, often voice strong opinions about the future use of a closed school. Reuse of a building may not even be considered until after a school is closed and the furor over closing has abated. Then, citizen adivsory committees may be appointed to consider and recommend future uses.

Finally, quite often rooms in active but under-enrolled schools are not really being used, but neither have they been officially recognized as surplus. Requests for use by arts organizations may nevertheless be looked on favorably, and the occasional enterprising principal may even informally solicit requests for use -- local administrative rules permitting.

All of this should alert the prospective surplus space user that the forces at work can be complex and even contradictory and that successful school reuse requires arts organizations to become familiar with the local situation and to make a case which is sympathetic with prevailing forces. Potential reusers should maintain a fair degree of flexibility when considering arrangements for use, and should understand that the school district or municipality may have to work within legal constraints.

An arts organization can seek to uncover small amounts of surplus space in operating schools that have not been publicly acknowledged, can enter the school closing process with suggestions that reuse be considered early, or may have to wait until a closing is announced, if reuse is not considered before. Also, many communities have school buildings that have been empty and idle for several years, outside the public limelight, but available for reuse.

Arts organizations should also be aware that finding and acquiring use of surplus space will bring them into contact with a cast of players that includes school boards and/or city councils, school district and/or municipal administrators, possibly one or more citizen advisory committees, and the public at large. Cultivating the support of these people, and finding ways to suggest how arts uses can further the goals of community and schools will help immeasurably. Public support has often been critical in getting an arts reuse accepted.

The Workbook

This workbook is designed to help arts organizations assess their space needs and to locate and evaluate surplus school space. It will support efforts to find compatible partners and to evaluate the feasibility of sharing space and costs equitably, when space available is more than any one group needs.

Characteristically, arts use of surplus schools can be generated from a

number of sources. The workbook materials can be used by any one of the most common initiating groups with slight modification. The four most common situations are:

An arts group or organization actively seeking new space. The arts group actively seeking new space will start by reviewing its purpose, its members and clientele, and its current and desired programs. From this review, it can develop location criteria and define the amount and kind of space it needs. The group probably has a good sense of its financial resources available for space acquisition and renovation.

This group will be searching for available space to reuse, and testing suitability, affordability, and other characteristics of candidate places that are uncovered. Surplus schools will be considered along with other possible sites. The arts group will be testing alternatives of ownership or leasing, possibly deciding to join with others to share a building that is larger than it needs.

An arts group or organization alerted to a surplus school. This group may not have been seriously looking for space before a specific opportunity was brought to its attention. This new opportunity will force the group to evaluate how well its existing quarters serve its current program and needs; what its future goals are and how well present quarters can meet future needs. This group may also have to reexamine its goals and may need to "test the waters" for future program expansion. It probably has not yet explored funding resources.

On the other hand, this group will be comparing only two specific places -- the existing space arrangement and the new opportunity represented by the surplus school space. It will need to test suitability, affordability, alternatives of ownership or use, and so on. If the space proves too big, or too expensive, or if the opportunity is only for part of a school, the group may also explore ways of sharing with other users, including the traditional school. Indeed it may have to search out other users.

If the group discovers that its present quarters are inadequate, but finds that the opportunity that was presented is not feasible either, the group may become active seekers of new space.

The "arts group" in either this or the previous example may be large or small; it may be a loose coalition of artists who share studio space, or a dance school, or a community orchestra, for instance.

The school building reuse committee. This committee has been formed to investigate reuse alternatives for one or more specific school buildings. Probably an appointed comittee of community residents, its starting point is a specific school building and its goal is to find potential users. It may be looking only at arts reuses or it may be looking at the arts as one of several possible uses. Depending on the committee's mandate, it will do one or more of the following:

- o prepare an information packet of materials on the school building
- o define the geographic community to be served
- o identify needs of arts organizations, artists, and arts consumers (including need for new programs)
- o establish criteria and conditions for selecting uses or users
- o actively seek out potential users; test alternative uses and layouts; and test and negotiate financing and governance arrangements

A community arts council or other consortium of arts groups. This council or committee is broadly interested in improving arts in the community, helping existing organizations, and determining new needs to be met. Although this group may not have started out looking for space to reuse, more than likely needs for space for the arts will emerge which could be met by using surplus school space.

The challenge for this group will be more complex. Since it is not a single arts organization looking for space for its own programs, the council will be looking instead for coalitions, partners, overlaps of need, underused existing resources, etc. The council may even become landlord, master leaseholder, or space administrator, or may assume other coordinating roles.

Obviously, the main actors in each of these scenarios have different purposes and needs. However, they must all ask many of the same questions and tackle many of the same issues. A community orchestra analyzing itself and its current and future programs and space needs must ask the same questions as a small artists cooperative invited to share studio space in a soon-to-be-closed school. A citizens committee developing a reuse plan for a surplus junior high school must ask these same questions of organizations that want to use available space.

Each "Form" in this kit is a core set of questions, information, or procedural guidance. A short discussion preceding each form identifies how the form is useful for each of the four scenarios. Some forms may be items a group can tick off, sitting around a table, in fifteen minutes; some may become the adjenda for an evening's meeting; some may require that task forces or subcommittees be appointed and spend several weeks working before reporting back to the full committee.

I TAKING STOCK

Taking stock is the initial part of any planning project. It includes reviewing current status, defining problems and goals, and outlining the scope of the project to be undertaken. This process provides the initial basis for determining space needs. For a small informal group of practicing artists, this may be the first time that they really sit down to consider purpose, goals, and plans. An established organization may simply be reviewing decisions made as part of a yearly organizational appraisal. A school reuse advisory comittee can use these same forms to clarify its goals and tasks.

Form I.1 "Who Are You" clarifies the ground rules and goals of the group. Form I.2 "Where Are You" will help a group to develop a systematic approach to finding space, or finding users for available school space.

These questions are deceptively simple -- they merely ask you to be clear about your goals, the scope and limitations of your efforts, your authority to take actions, and a few other basics. Once you can state these things clearly, you will probably refer to them again later in planning -- to check that you're still on target and within bounds. If any of the bounds become too limiting, this form will help you identify which items need changing and with whom you need to negotiate for the change.

1. Who or what are you?

____ Arts organization
____ School reuse committee
____ A group of artists
____ Consortium of arts organizations
____ Advisory committee
____ Other:

2. What is your charge or your goal?

Do you have a formal mandate?
If so, what is it and from whom:

If not, how would you state your purpose for this planning effort:

____ Are you starting with a surplus school building and looking for users?

____ Are you starting with a need for new quarters for your arts programs and looking for space?

____ Are you trying to assess and coordinate the needs of many arts groups, of which space is but one need?

____ Have you recently become aware of a school building available for reuse, and need to assess whether it might meet your needs?

____ Other:

3. What are your big objectives? Your underlying concerns? When all else is said and done, what do you hope to have accomplished?

4. To whom are you responsible?

   Is this a formal or informal arrangement?

5. What are your powers and limitations? What commitments can you make and on whose behalf?

6. List any constraints you are aware of at the outset.

7. What's your target date for making a final decision, or preparing a report of recommendations?

8. Who else should be involved in planning from the beginning?

   Who else may become actively involved later...and should be kept informed from the beginning? (for example, potential partners, or people whose permission or support you might need)

9. Should you have an information program -- for the 'general public', your membership, or some other targeted audience?

   If so, what do you propose?

Few planning efforts proceed smoothly from a beginning to an end, along a straight line path. Usually there are many detours, loops, dead-ends, and fits and starts. A formal list of planning steps is nonetheless useful as a starting point, to identify which things have already been completed and which still need to get done, and to organize the remaining work.

Use the accompanying chart to review steps already taken and still to be taken. For those steps which have been accomplished, briefly note the outcome. Organize yourselves to carry out the work not yet done -- establish time lines, tasks, responsibilities, etc. For each item, identify:

- How you will undertake it;
- When tasks will be completed;
- What resources or support will be needed;
- Who will participate;
- How you will communicate progress to your constituency and to the community at large.

PLANNING PROCESS CHART

PLANNING TASKS	WHERE YOU STAND* A	B	C	COMMENTS AND CLARIFICATIONS
GET STARTED				
Identify concerns and opportunities				
Establish scope of planning				
Assemble planning team				
Define problem(s) and goal(s)				
Consider cooperative planning with other groups, if appropriate				
Create a plan for planning, including realistic schedule				
Select a steering committee				

* A = Task completed
B = Task started, but not yet completed
C = Task not yet started

PLANNING TASKS	WHERE YOU STAND* A	B	C	COMMENTS AND CLARIFICATIONS
GATHER INFORMATION				
Define your "community" or constituency and target audience				
Collect 'hard and 'soft' data about needs				
Learn about local school district regulations and legal constraints				
Look at future trends as they affect your group				
Identify community resources and collect information on them				
IDENTIFY PRIORITY NEEDS AND PROGRAMS				
Develop criteria for selecting programs and needs				
Solicit suggestions and recommendations for new programs				
Select programs which meet criteria				
Determine space and location requirements for programs				
SEARCH FOR AND EVALUATE AVAILABLE SPACE				
Find a good location				
Evaluate alternatives for fit, cost, and suitability				
Explore alternatives for ownership, leasing, sharing				
DEVELOP AND REFINE PLAN				
Define space uses and renovations				
Prepare capital and operating budgets				
Develop administrative structure				
Secure support from government agencies, if needed				
Test ability to raise needed funds				

* A = Task completed
B = Task started, but not yet completed
C = Task not yet started

II PROFILES OF ARTS AND RELATED ORGANIZATIONS

Preparing a profile of your own organization is a good way to review your programs, your activities and financial resources, and your future plans. If you will be looking for space to reuse, this is the information a school district, reuse commmittee, or potential partner needs to have to understand and evaluate your organization.

A series of profiles of community and regional arts groups, such as an arts council or other coordinating agency might collect, can be a valuable planning tool for all the groups. Such a collection could:

- yield information about the "state of the arts" -- program availability, areas of strength and weakness, degree of support, diversity, and so on;
- identify arts programs that could enrich the school arts program;
- identify potential compatible partners for sharing school space or developing new programs in a reuse project;
- identify organizations that could sponsor new programs;
- identify other spaces in the community that are also available but were unknown. This might allow program goals to be met without additional space, or by using a number of spaces.

Two forms are included in this section -- a brief profile (Form II.1) and a detailed profile (Form II.2). The brief form is suitable for starting an information bank, making an initial survey of arts groups to guage needs and resources, or as a supplement to the initial space request form (Form III.3). The detailed form can be used to get information about selected groups or to pursue leads uncovered through the brief forms. It should also be used for an organization's self-analysis.

Organization: Contact person:

Address: Title:

Telephone:

Geographic region served by organization:

PURPOSE AND ACTIVITIES

Describe the major purpose and activities of the organization:

SCALE OF ORGANIZATION

Number of members, if membership organization _____

Number of paid staff members, if any _____

Number of active volunteers, if any _____

Number of shows/exhibitions/concerts/etc. last year, if any: _____

Total expenditures last year _____

Describe how money was spent:

Total revenue last year _____

Describe revenue sources:

CURRENT SPACE USE

Describe space now used and arrangements for use. (If your organization provides performances, be sure to describe rehearsal and support space as well. If your group mainly does studio work, describe exhibition space used, too.):

FUTURE

Describe any future plans for changes in the organization, its goals, activities, etc. in the next three years:

Is the organization actively interested in finding new accommodations?

____Yes ____No _____Maybe

Organization: Contact person:

Address: Title:

Telephone:

STATUS OF ORGANIZATION

Incorporated _____ Profit _____

Tax-exempt _____ Nonprofit _____

Membership organization _____

Is the municipal government or school district directly involved in the organization's board membership, funding, or staffing?_____
If so, how:

PURPOSE

Describe the major purpose and activities of the organization. For instance:

____classes ____host traveling performance

____workshops/seminars ____exhibitions of members work

____performances ____host traveling exhibitions

____sell art work

____coordination and other support services for members or member organizations

____provide studio, rehearsal, or teaching space for members

____other:

SCALE OF ACTIVITIES

Number of full-time paid staff:

Number of active volunteers:

Describe geographic region served by organization:

If membership or subscription organization, number of members or subscriptions in last year:

_____ individual
_____ family
_____ corporate or group
_____ other:
_____ TOTAL

If performances are an important activity:

About how many people attended in the last year? _____

How many total performances were given? _____

How many different performances were given? _____

What was the largest amount paid for a single visiting performing group or artist, if any? $_____

What was the largest amount earned from a single show? $_____

If exhibitions are an important activity:

About how many people attended in the last year? _____

How many total days were exhibits open? _____

How many different exhibitions were mounted? _____

What was the largest amount paid for a single traveling exhibit or artist, if any? $_____

What was the largest amount earned from a single exhibit? $_____

If classes are an important activity:

How many people enrolled in classes in the last year? _____

How many different classes were given? _____

How many hours/week were classes offered, on average? _____

FINANCES

Total endowment, if any $_____

Total expenditures last year $_____

Total revenue last year $_____

Total accumulated deficit or surplus $_____

Sources of income/revenue:

Earned private—admissions, memberships, bookstore sales, fees for services, etc. _____% of total

Public grants and awards--State Arts Council, NEA, school board, etc. _____% of total

Earned public _____% of total

Private contributions _____% of total

Other: _____% of total

CURRENT SPACE USE

Include rehearsal, prop-building, and other support space, as well as performance, exhibit and studio space.

Does the organization regularly use space full-time? ___Yes ___No

If so, briefly describe space and how it is used:

Hours/day, days/week, weeks/year space is actively used (use whichever gives clearest idea):

Does the organization regularly use space part-time -- once a week, twice a month, etc? ___Yes ___No

If so, briefly describe space and how it is used:

Hours/day, days/week, weeks/year space is actively used (use whichever gives clearest idea):

For primary space now used, does the organization:

____own it ____share space, describe:

____rent, long-term; lease ends_____

____rent, short-term; lease ends_____ ____other, describe:

Approximate total size of space: full-time _____SF

part-time _____SF

Total cost of space last year $_____

Cost of space per square foot last year $_____/SF

Percentage of the organization's total Expenditures last year used to pay for space _____%

Give a rough rating of the adequacy of space now used:

Good						Bad
1	2	3	4	5	6	7

FUTURE PLANS AND SPACE NEEDS

Does the organization currently plan any major changes in its programs in the next three years, such as addition of new programs or deletion of existing programs? If so, describe:

Does the organization plan any major changes in goals or purpose, audience or members, or scale of activities? If so, describe:

Is the organization:

actively seeking new space ___Yes ___No

not actively seeking, but generally interested ___Yes ___No

If the organization is seeking new space:

Roughly, how much does it need? _____SF

What price range can the organization afford? $_____

What kind of space is needed?

III ESTABLISHING SPACE AND LOCATION NEEDS FOR PROGRAMS AND ORGANIZATIONS

Whether starting from scratch and searching for available space, or evaluating the opportunity presented by surplus school space already identified, planners must seek a reasonable match between need and opportunity.

The forms in this section can be used to collect information about location and space needs of programs and organizations seeking new quarters. The information can be used to structure a search for space, to evaluate opportunities, and to identify organizations and programs with similar needs that might jointly occupy space.

Form III.1 "Defining Location Needs" will help an organization to analyze how location may be important in helping or hindering current and future programs, and to identify characteristics of location that are important. Once this has been done, the same information can be used to define target areas for searching for space and to evaluate an opportunity or rate several alternatives, including current space. If the organization is actively looking for space, it will probably be considering alternatives in addition to surplus schools. If the location analysis leads to the conclusion that some programs need to be in very different places, this form can help to analyze clusters of programs with similar location needs.

The first listing of space needs is likely to be an optimistic starting point for negotiation and testing. One way to create an estimate of total size is to start by defining the needs of each activity or program. In other words, answer the question, "If we want to do program 'A', what kind and amount of space is necessary?" After the program needs are listed, then areas of overlap and duplication can be identified to create a tentative master list and a total space need estimate for a specific combination of programs. Form III.2 "Space Needs Profile for Programs" is typical of this building block approach, providing for identification of space needs for each program.

If you have a very simple plan -- one organization and one program -- Form III.2 or III.3 will provide sufficient information.

If several programs are being considered, Forms III.3 and III.4 should be used to explore possibilities for sharing space, and then a summary listing of space needs should be made on Form III.5. As spaces are identified and tested, different combinations of programs will probably also be tested.

From this analysis, the characteristics of a building being sought -- if the search is on for space -- can be listed. Once candidate buildings are selected, or when the starting point is a single available surplus school, the suitability of the space for programs can be relatively easily gauged. It is important to be as specific as possible about intended uses of space. One characteristic of reuse is that a different kind of space from that envisioned may be available, but with imagination can be used to meet the same need.

Form III.6 is a space needs summary that combines information about an organization and its space needs. This form would be useful for a school reuse committee soliciting proposals for space use, or for an arts organization soliciting partners. A completed form would provide enough information to make a first determination about whether to pursue the arrangement. If the initial decision is favorable, then the detailed organization profile (II.2) and detailed space needs and uses forms (III.2, III.3, III.4) can be used.

Program(s):

Sponsoring organization:

Briefly describe activities that would be taking place, and the hours and days of heaviest anticipated use.

ACCESS

Describe the geographic area from which users (participants, audiences, etc.) will be drawn:

Anticipated common modes of travel:

____car	____subway	____bicycle
____public bus	____train	____foot
____chartered bus	____other:	

What are important location characteristics to look for in terms of transportation, such as nearness to major highways or bus routes, or availability of parking?

On a scale of 1 to 5, where would you place location/access in terms of importance to the program's success?

Very important				Not very important
1	2	3	4	5

SURROUNDINGS

Does the nature of surrounding properties make a difference to the proposed program?

How could they contribute positively to your plans?

How could they detract from your plans?

Can your plans contribute positively to certain kinds of neighborhoods? If so, how?

SITE

Is a minimum or maximum size of site necessary?

What features are needed outside, such as parking, to support activities and programs?

Do any of the programs or activities being considered have special outdoor needs so important that if not present, the activity or program could not be provided?

Fill out this form for each program being considered.

Program:

Sponsoring organization:

This program is:
___ a new program
___ continuation of an existing program
___ an expansion of an existing program

NEED FOR FULL-TIME SPACE

Type of space, room or outdoor area	Number of spaces needed	Size or capacity	Describe how space will be used.

NEED FOR PART-TIME SPACE

Type of space, room or outdoor area	Number of spaces needed	Size or capacity	Describe how space will be used.

SUPPORT SERVICE NEEDS

Describe support services that might be porvided on a shared basis and that would help this program.

Use this form to make a master chart of potential users or programs and the spaces they have identified as needing less than full time. This chart will give you a good idea of the degree of sharing that may be possible. It will also identify which parties should be meeting together to explore in greater detail how they might share space.

Possible programs/user organizations:

#1 _____ #4 _____

#2 _____ #5 _____

#3 _____ #6 _____

Spaces Identified as Needing Less than Full-Time Use	PROGRAMS/USER ORGANIZATIONS					
	#1	#2	#3	#4	#5	#6

SAMPLE OF SPACE NEEDS FORM

Possible programs/user organizations:

#1 Individual artists with studios
#2 Art League
#3 Theater Guild
#4 Friends of Music
#5 Artists without studios in the building

Spaces Identified as Needing Less than Full-Time Use	PROGRAMS/USER ORGANIZATIONS #1	#2	#3	#4	#5	#6
working studios	X					
teaching studios		X			X	
rehearsal space:						
individual						
small group			X			
large group			X			
darkroom	X	X				
print shop		X	X	X		
offices		X	X	X		
exhibition space	X	X			X	
storage			X			
selling	X				X	
auxiliary rooms:						
restaurant	X	X	X	X	X	
coat room			X	X		
library						
childcare	X	X	X			

For each space that might be shared, make a detailed chart of times when each program or user would like to use it. Use the same format to make a composite chart -- finding areas of overlap and/or underuse. The chart can be a focus for trying out different schemes and compromises.

_____
Space

WEEKLY USE

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8am							
10am							
noon							
2pm							
4pm							
6pm							
8pm							
10pm							

Try out possible weekly schedules, by blocking out times for different programs and users.

MONTHLY, SEASONAL, OR OCCASIONAL USE

Identify needs which are less frequent or regular, and make a master list of these, too.

If several programs and/or organizations are being considered, produce a brief summary of space needs for the combined set of programs.

If a number of combinations are being considered, a summary of the needs of each combination should be prepared.

_____
Combination

FULL TIME SPACE NEEDS FOR EACH PROGRAM

Program	Amount of Space Needed Full Time	Brief Description
	SF	
	SF	
	SF	
	SF	
	SF	

SHARED AND SUPPORT SPACE NEEDS

Room/Space	Size	Brief Description
	SF	
	SF	
	SF	
	SF	
	SF	

TOTAL space needed for this combination: _____ SF

Requestor:

Address:

Telephone:

If requesting use as an individual, check here _____

If an organization, name and title of contact person:

Brief description of intended use of space:

If an organization, answer the following two questions:

1. Brief description of organization's purpose and programs:

2. Total organizational expenditures for last three years:

Year	Total Expenditures
_____	_____
_____	_____
_____	_____

If criteria have been developed by a building reuse committee for selecting among interested users, ask questions related to the criteria here. For example, if one of the criteria is that the users benefit the community at large, ask how they propose to do so. If only nonprofit organizations are sought, be sure the requestor qualifies. If you are especially interested in arts activities that will enhance arts programming in the schools, then examine this issue carefully.

Space type and size	Proposed Use	Anticipated Peak Use Times

Total amount of space needed: _____ SF

Total amount of money can afford to pay for this space: $_____

Cost per square foot can afford to pay for this space: $_____/SF

IV PROFILES OF SCHOOL BUILDINGS

Just as information needs to be gathered about programs and organizations seeking space, so does information need to be gathered about school buildings and spaces that may be available for arts use, and about the conditions which would affect school reuse.

Profiles of available spaces will help potential users to evaluate the feasibility of adaptation to their needs and will help a school building reuse committee to judge the fit between space and possible users.

The two forms here provide basic and detailed checklists for building information.

If an arts organization already knows of surplus school space within the identified geographic target area, it should contact the appropriate school district superintendent's office first. If the school has been transferred to municipal jurisdiction, that office will provide information about who to contact. If a citizen's advisory council has been appointed to investigate reuse potential, the superintendent's office can likewise provide the appropriate contact.

If an arts organization does not know of any surplus schools or available space, it should inquire with the superintendents of all school districts in the appropriate geographic area. (If you do not know district boundaries, your local school district can help you identify neighboring districts.) Be prepared to describe your space needs and ask whether there are existing surplus schools, schools that will be closed in the near future, or space available within operating schools.

School districts vary in the way they go about finding alternative uses for surplus space. Some large school districts, with many schools, have designated one staff person to match requests for use with available space. Some districts have established procedures for soliciting and processing inquiries and have developed standards for rental agreements or sale of buildings. Other districts are considerably less organized and may not really know how to handle an inquiry.

Arts organizations may be able to get representatives appointed to citizen advisory committees or otherwise take the initiative in proposing arts reuse of surplus space. Decisions to close or reduce schools can be greatly helped if district officials and community residents know that potential users exist -- and arts uses are usually enthusiastically received.

Once a building has been identified, an arts group should seek the basic information listed in Form IV.1 and, if it looks promising, the detailed information outlined in Form IV.2. All of the information called for should be available from school district records, and from an on-site inspection of the school.

A committee seeking to find users for surplus schools will increase the chances of success by creating an information packet giving the information called for in Forms IV.1 and IV.2. By making this packet freely available to interested organizations, it demonstrates a readiness to proceed in orderly fashion and gives organizations the basis for evaluating space and costs.

A school reuse committee should gather and make available this basic package of information about a building when it announces that space is available.

An organization seeking space or told about the availability of surplus school space should likewise gather at least this basic data.

School:
Address:

____ Entire building
____ Partial building, describe:

Grade levels served: _____ Space: ____ is available now
____ will be available _____

Brief Description of Site and Surrounding Neighborhood:

Size of site:

Building Size: Gross Square Feet _____ Net Square Feet _____
Number of Floors _____ Approximate Age of Building_____

Zoning Designation: _____

Parking on site?_____ If so, for how many cars? _____

Describe the construction of the school and the types of interior partitions:

Apparent Condition of Building:

Very good Very run down

1 2 3 4 5

Describe the heating and air-conditioning systems and fuel type:

Other important building features:

ACQUISITION OR USE

Have any conditions already been established for building use? For example:

____ purchase only

____ lease only

minimum lease period of _____ maximum lease period of _____

____ minimum purchase or lease price of $_____

____ asking purchase or lease price of $_____

Have any conditions already been established for types of eligible users or of eligible activities? If so, describe:

What conditions have been established about the procedure to be followed for pursuing interest in using space? List here steps and dates to be followed:

ADDITIONAL MATERIALS

In addition to this information, attach:

* A map of the site and adjacent land parcels, showing size of site, building location, parking, and location and type of buildings on adjacent land parcels.

* A floor plan of the building, showing all rooms and their sizes for all floors of the building. Use the floor plan to create an inventory of all rooms and their sizes. If a floor plan is not available, make an inventory anyway.

While this additional information will probably not be neatly packaged and instantly available to potential space users, it is important to develop for surplus school space that passes the initial review. The arts groups should start a file to collect this, and the building reuse committee should be prepared to discuss these items with potential users.

LOCATION AND SITE

- o Zoning -- detailed information about allowable uses, forbidden uses, uses available under special conditions or variances
- o If variance or rezoning would be needed, likelihood of its being granted
- o If reuse would entail payment of property taxes under some conditions, what those conditioners are, and cost of taxes, if known
- o Location with respect to major local thoroughfares and highways
- o Location of public transit routes; frequency and quality of service
- o Any major changes affecting the neighborhood in the planning stages, or on file in municipal planning office
- o Crime rate and general level of safety in the neighborhood

THE BUILDING

- o Any special features of the building that may be relevant to potential arts users, such as sinks in all classrooms and technical features of auditorium
- o Effect of proposed new use on compliance with current building and life safety codes -- if changes needed, estimate cost, time frame, and responsibility for compliance
- o Utilities consumption figures for most recent year and any other information that would help in accurately estimating operating and maintenance costs. (To make sense of uilities information, describe hours and months of building use.)
- o Cost per SF of operating and maintaining the building in the most recent year of active use
- o Any special constraints affecting cost, such as outstanding bonds, legal requirements for sale or rental at market value, or requirement to accept highest bid.

- Full details of procedure, if established, to be followed for acquisition, and any constraints and conditions that apply. (Those may include, for example, minimum or maximum length of lease; need to get approval through a town-wide referendum; or prohibition against subleasing of space).

SCHOOL DISTRICT CONSTRAINTS

(This information may not be immediately necessary for deciding on reuse, but it provides good understanding of the pressures at work and the flexibility possible. It will also help an interested arts organization to develop a proposal that is responsive to local conditions.)

This set of questions is relevant to use of space in operating schools for non-school purposes:

- Can the school board rent space in a building that houses K-12 programs?
- Can the school board allow any group to rent space in a school? What are the limitations?
- Are there limitations on the length of lease a school board can enter into?
- Must the school board charge the same rent to all users? Is a minimum level of rent required?
- Who receives rental income (municipality or school board)? What can it be used for?
- Are there procedural requirements for selecting users?
- Must the space used for the K-12 program be physically separated from space used for other purposes (by a wall, for example, which might require building modification of doors, staircases, bathrooms)?
- Must the "non-school" portion meet building codes for other uses, and if so, would that require major structural changes? Would introduction of new uses require structural changes needed for current codes?
- Can the school board spend money to make buildings suited for parallel use, if it recoups that investment from rental income over the term of the lease?
- What are the tax implications of mixed school and non-school uses in the same building?
- Must the school board seek permission from any state agency, or get formal community approval before renting space in a school building?

This set of questions is relevant to reuse of entire school buildings:

- Who owns the school building and school site (school district, or municipality, or county)?
- Can the school board lease or sell an empty building, or parts of one? Can it lease or sell a building and the surrounding grounds separately?
- Can the school board lease a school to one umbrella organization, which then subleases portions to other organizations? Or, must the school board directly manage a building it continues to own?
- Must a school be formally declared surplus before it can be leased or sold for other uses?
- Does state law stipulate a process, requiring public participation or voter approval, for lease or sale of a school? Is approval from any state agency required?
- Can a surplus school, or part of it, be leased or sold to any group? Can it be leased only to specific kinds of groups?
- Must activities and uses for surplus schools conform to local zoning codes under lease arrangements? (It must under conditions of sale.)
- Can the school board enter into both long- and short-term leases?
- Will the conditions affecting the amount of rent that can or must be charged -- such as "fair market value" -- reduce the pool of possible users?
- Will rent be sufficient to cover operating and maintenance costs, and to pay outstanding indebtedness?
- Who receives income from lease or sale of surplus property? What can it be used for? (Income from sale in one state must be used to repay original state construction assistance. In some states, income must be used for improvements to existing facilities.)
- What are the tax consequences of leasing a surplus school?
- Must a surplus building, leased for other uses, be brought up to current building and life safety codes?
- May a school district pay for modifications to a school building prior to lease by non-school organizations, if it intends to recover the cost over the term of the lease?

- If a surplus building is leased for other purposes, and later is brought back into use as a school, must it meet new building and life safety codes? What approvals are necessary from the state education department?

OTHER CONSIDERATIONS

- Feelings of neighborhood residents and/or merchants about future of the neighborhood and of the building.
- Neighborhood and community feelings about proposed reuse for the arts.
- Number and nature of competitive proposals for the building. Assessment of whether any possibility of combining proposals, and probability of your proposal being accepted.

V SELECTING PROGRAMS, USERS, AND ACTIVITIES

Some choices and compromises will have to be made about the programs and activities to be included.

- A school reuse committee will have to choose whether to simply solicit space requests from organizations or to actively and independently set about determining the "arts needs" of the community.

- An arts organization may want to team up with others, or an arts council may try to forge a coalition of programs and organizations -- both to take advantage of a surplus school that is too big for a single user. In each case, they need to set up guidelines for choosing partners.

- Available space may not be big enough, or otherwise suitable for all the programs the planning group wants to accommodate. Some programs will have to be dropped, reduced, combined, or changed if the bigger scheme is to work.

- You may have a list of terrific ideas for new programs which are as yet untested. If the risks or the cost of failure are high, you need to 'test market' some of the ideas before deciding whether to pursue them.

Form V.1 "Criteria or Ground Rules for Programs and Users" will help you to sort out what you are looking for by way of programs and activities, and to develop guidelines for a search or a review of proposals. This section will help you avoid the danger of first asking for all suggestions and then deciding what looks "best" or "most worthwhile." This latter route is unfair to groups who might put a great deal of effort into evaluating and figuring out how to use and pay for space, only to be told they have been rejected for no particular reason.

Any group in a position to shape a major proposal or to choose among suggestions should start with the assumption that there will be more suggestions

for activities and users than the space can accommodate. Sooner or later this will be true, if the reuse is successful.

Form V.2 "Enhancing School Programs" is very important. It suggests arts programs that may be provided by an arts organization or group of artists and organizations, and that will enhance the arts education programs in the schools. Obviously, any arrangement that will benefit the educational program will be viewed positively by the schools and will form an important basis for negotiations and "trade-offs."

Form V.3 provides guidance on generating suggestions for new programs that can be used by either arts groups or reuse committees interested in actively defining unmet arts needs. Market testing, as used in Form V.4, is a way of testing audience or participant interest, or of developing rankings among a number of proposals. This information should guide groups in deciding which programs to pursue further.

Criteria or ground rules for selecting programs or users are more concrete expressions of the goals identified in Section I. They can be used to guide an active search for partners and organizations, or to create new programs. They can serve as eligibility guidelines for groups that might be interested in proposing uses, and for review of applications.

An arts group which becomes aware of available surplus space, or which is approached as a possible partner can use this list in probing to find out what ground rules have already been established and whether they are consistent with the group's needs and goals.

First, restate your goals as described in Section I:

The list which follows is intended as an idea list. It covers many items which have been used to shape arts reuse projects, to develop programs, and to select among competing proposals. They should be considered in developing your own list of criteria:

NEEDS

____ Are any specific programs or activities integral to the goals? If so, list:

PROGRAMS

____ Some measure of whether programs are 'needed'. (Should be as clear as possible about how 'need' is to be measured or assessed.)

____ Possibility for development of new programs or joint programs among several organizations, that would not be possible otherwise.

____ Broadens, complements, or expands activity mix under consideration.

____ Can programs be carried out equally well elsewhere?

BENEFICIARIES

____ Proposed uses should benefit "the community", or "the schools", or some other target groups.

____ Whether beneficiaries are to be primarily individuals or organizations.

____ Whether geographic focus of beneficiaries/audiences/users is important -- eg. neighborhood, town, region.

____ Whether numbers or types of people to be served, is important.

ADMINISTRATION AND ORGANIZATION

____ Seeking as many partners as possible,as few as possible, etc.

____ Seeking partners to share responsibilities equally and to make decisions collectively.

____ Seeking to have one lead organization with major responsibility and long-term commitment and other organizations as 'junior partners'.

____ Only organizations or only individuals eligible as partners, or both.

____ Any attributes required of organizations or individuals -- eg tax exempt; nonprofit; performing arts; well-established; new and struggling; membership organizations; educational; professional artists; etc.

FINANCES

____ Ability to contribute upfront money to help cover capital expenses.

____ Ability to reliably pay fair share of annual costs.

____ Annual cost of using space should be no more than X% of organization's expenditures.

____ Fair share cost can be waived if a user agrees to contribute services.

____ Ability to generate a profit.

____ Can share in cost of specialized space, needed only part-time for any one program, and thus helping to justify it.

BUILDING AND SITE IMPACTS

____ Degree of structural change for exterior or interior of building.

____ Preservation or upgrading of building, especially if historically significant.

____ Degree of change to site.

____ Ability of neighborhood, site, and building to absorb proposed use patterns (number of people , hours of use, traffic, noise).

One of the exciting possibilities of matching arts organizations with surplus school space is the development of related programs and activities that enrich the arts programs of the schools. Potential benefits are mutual: The schools can have access to programs otherwise unavailable, and perhaps unaffordable. Arts organizations can enlarge their constituencies and either swap services for reduced rents or perform services on a fee basis for the schools.

The booklet The Arts in Surplus Schools documents many such mutually helpful arrangements and should be reviewed for ideas. Some programs have included:

- professional artists teaching special classes, accepting high school apprentices, critiquing student work, etc.
- artist studios available for tours to student groups
- theater, dance, and music performances for students; development and teaching of special seminars or modules in theater, dance or music — often related to curriculum
- internships for students in professional productions and learning special skills (in performance, lighting, costume...)
- sponsorship of student production/performance companies, during the school year or in summers
- development of special workshops available on a fee basis to schools in a wide geographic region
- in-service education for arts teachers from the schools

Arts organizations can strengthen proposals for space use by suggesting how they can provide services for students and teachers. This is a distinct advantage that arts groups have over many other potential space users and fills a real need for the schools, since program cutbacks frequently accompany declining enrollment. Advanced, specialized, low-enrollment courses are usually the first to be dropped, and extra-curricular activities are often also curtailed.

School reuse committees might consider asking potential users to propose arts education programs, and use that as an assessment mechanism for selecting users.

PRELIMINARIES

1. Do the goals identified early on, or the criteria for selecting new programs and users, limit the types of new programs you are willing to consider?

   If so, briefly review the limits:

2. Have you identified whose suggestions you are seeking?

   For example, a small group of artists who have decided to collectively seek working studio space, may consult only among themselves. Discussions might lead to consideration of joint exhibition and sales space and inviting other artists to exhibit and sell for a commission, or to consideration of teaching classes individually or jointly.

   A membership or subscription organization might seek advice from its immediate constituents. An arts council or community development council might seek input from a wide variety of organizations and from representatives of the community at large.

GENERATING IDEAS

1. The Forum. Small groups of people talking together are the most productive method for generating ideas. Meetings held within a space of several weeks allow people to think about things, talk with friends and neighbors, and develop new ideas. Large meetings can be held, provided they break into small discussion groups and each group reports on its ideas. Somebody, of course, must keep a list of ideas suggested. Passing the list around is likely to generate more ideas.

2. Questions. The best questions to ask are rather loose and open-ended. The answers (suggestions) may also be somewhat ill-defined at first. Samples of typical questions for soliciting suggestions include:

   - o I wish there were a place where [I, kids, old people, ...] could ....
   - o Where do [community residents, painters, dancers, our members, ...] go for [concerts, movies, supplies, classes, ...]? Which of those things would they do closer to home if they could?
   - o What is missing in this community now? What opportunities, if available, would make life more interesting in terms of the arts?

   Also think about suggestions that have been made over the years for changes, modifications, and new programs.

As an example, in one major metropolitan suburban area there were already a number of active community theater groups that mounted full scale productions. There were also many residents who wanted to be active in these groups, but who couldn't because their work, travel, or family commitments did not permit them the time for rehearsal, preparation, and performance. The idea was suggested that some method requiring less time commitment be developed for people who wanted to be theatrically active. A "Readers' Theater" resulted -- no sets, no costumes, no movement, but the chance for a cast to develop a play for reading.

Program suggestions that appear to meet criteria and to generate interest will have to be further developed into specific proposals. A specific proposal will address a number of items, including those in the following checklist:

____ intended audience/participants
____ sponsoring organization
____ number of people to be served, total and at any one time
____ staff needs
____ supplies and equipment needs
____ schedule of meetings or activities
____ cost and budgets
____ space needs.

"Market testing" may be used as part of the process of developing specific proposals or to test proposals once developed. A market test may be formal or informal, and the importance of a test depends on the degree of financial risk at stake -- the cost of failure. A market survey may also be used to compare a number of different proposals. The scope of variation is enormous.

For example, an established and financially stable arts council risks little in offering a new drawing course in an art center. No new and expensive equipment is required; it can be canceled if too few people sign up; and the space could be used by other people. Nonetheless, the council might still market test the idea by polling community residents about their interest, and by seeing what demand has been for similar courses in the past and in nearby locations.

At the other end of the scale, a proposal to form a new organization to bring in touring music, dance, and theater groups and to pay for one half the cost of operating and maintaining a large auditorium is very risky. A much more thorough market survey would be needed to test the ability to attract desirable performing groups at reasonable fees, the suitability of space for touring company requirements, and the ability to attract a large enough audience for these groups to generate income to cover the cost of performances and the cost of using auditorium space. Such a proposal would warrant a survey of community residents and of booking agencies and also gathering information about similar ventures.

After program proposals have been generated, the planning group might conduct a more formal written survey, such as the following, of organization members, or community residents to test interest, need, and relative enthusiasms.

MARKET SURVEY OF PARTICIPANTS OR AUDIENCES

Use this sheet as a guide to developing your own survey to "test the market" for major new program ideas.

Information About Program and Survey

Brief description of proposed programs and entire project:

Describe who you are surveying and how the information will be used:

Provide instructions for what to do with the survey, e.g., mail return address and date; place to deposit; when it will be collected and by whom.

Request Information About Person Answering Survey

Age:____

Number and ages of people in household:

Town/City/Village of residence:

Affiliations, if important, e.g., member of certain organizations of interest:

Program Suggestion	Interest Rating*	Do you engage in similar activities now? Y/N	If so, how frequently and where?	If included in the project, would it replace or supplement current activities?

*Interest Rating: Rate the degree to which the program suggestion is of <u>immediate</u> interest to you or someone in your household.

1 = Would definitely participate or use regularly
2 = Likely to use occasionally
3 = Likely to use rarely, if at all

VI TESTING THE FIT BETWEEN SPACE AND PROGRAM ALTERNATIVES

The process of testing alternatives for fit may be complex or simple. Basically, "fit" means that the space in question can meet your needs, or can be made to meet your needs within your financial resources. Fit has several components — overall size of space, layout of spaces or rooms, structural integrity and legal compliance with applicable building and life-safety codes.

Space available for reuse was usually designed for other purposes, so organizations need to consider the adaptability of existing spaces. One of the fortunate aspects of arts reuse of school spaces is that a good fit can often be achieved with relatively few changes. The number of different programs and organizations you are seeking to accommodate -- the complexity of your intended scheme -- also affects the ease or difficulty of finding a good fit. Finally, if there is need or desire to share a good deal of space among many users, some effort must be spent exploring ways of sharing space to meet a variety of needs.

The forms in this section provide guidance for testing the fit of space. An arts organization can use them to test the ability of existing quarters to meet future needs, and to compare one or more surplus school possibilities. A school reuse committee can use the forms to evaluate several combinations of users or programs which have expressed interest in using part of the building.

The process of testing programs and spaces is often cyclical. Numerous combinations may be tested and programs may be added, dropped, or modified in the search for good fit.

Comparison of rough sizes can be approached from several directions. Since this is a comparison of total sizes and needs, opportunities for sharing should have been explored first.

STARTING WITH A BUILDING

If you start with a specific school building for reuse, you start with the size of the building. If you have one basic proposal to test -- one combination of programs -- then you simply compare:

_____ SF	_____ SF
Available Space	Total Space Needed

More likely you will be testing several different combinations of programs and users. For each combination, then, you need to compare the total space needs with the available space:

_____ SF
Available Space

Program/User Combination #1: _____
_____
_____

_____ SF
Total Space Needed

Program/User Combination #2: _____
_____
_____

_____ SF
Total Space Needed

Program/User Combination #3: _____
_____
_____

_____ SF
Total Space Needed

Program/User Combination #4: _____
_____
_____

_____ SF
Total Space Needed

STARTING WITH PROGRAMS

If you start with a specific combination of programs and uses, you start with a certain amount of total space needed. Then you compare each available space identified with the amount of space needed:

_____ SF
Available Space

Space Alternative #1: _____
_____
_____ _____ SF
Total Space Needed

Space Alternative #2: _____
_____
_____ _____ SF
Total Space Needed

Space Alternative #3: _____
_____
_____ _____ SF
Total Space Needed

Space Alternative #4: _____
_____
_____ _____ SF
Total Space Needed

Occasionally, both things may be uncertain. More than one combination of programs and more than one building are under consideration. Several of these charts will have to be developed to test all the possibilities.

MAKING ADJUSTMENTS

If the space available is too small, consider these possibilities:

* Can you construct an addition to the existing school? If so, you will need to determine the cost and assess each program's ab lity to pay its share of the larger building, or assess the likelihood of finding special construction funds.

* Can programs share more space than originally planned and thereby reduce the total amount of space needed?

* Can you drop some programs or plan to locate them elsewhere?

If the space available is too large, consider these possibilities:

* Are there additional programs you could house in the building that could use space and enrich the activity mix?

* Are there unrelated, but compatible, uses for the space? Would you be willing to undertake responsibility for finding other users, or would you like the school district to do so?

* Can you lease only that part of the school you need?

* Can you effectively close off part of the school, and reduce operating costs, until such time as you are ready to expand?

Actual testing of combined space needs and how they might fit into a particular building is commonly done in two major steps by planners and architects. The first step is somewhat abstract -- it ignores walls and concentrates on desirable relationships among spaces. The second step takes the results of the first step and compares them with the structural realities of walls and floors.

BUBBLE DIAGRAMS AND SPACE RELATIONSHIPS

Bubble diagrams, showing adjacencies between spaces and rough sizes, are a method for making the transition between individual space needs and rooms to an actual school building layout.

If plans call for similar kinds of spaces, with similar use patterns, little time will probably be needed on this step. For example, if plans are for an entire school building to be used as individual artist studios with one shared gallery, and if only the gallery is to be open to the public, then the relationship requirements are relatively simple. The gallery should be near or next to a single public entrance. Studios should be separate from the gallery. In fact, the gallery could be in a different building.

If, however, plans call for a wide variety of spaces that will be subject to widely varying use patterns, a fair amount of time might have to be spent at this stage. And, after an initial try at real test layouts, planners might have to step back here to rethink important relationships among spaces.

TRIAL LAYOUTS

Here is where you try to fit spaces needed, and relationships desired, into the walls and floors that exist and the nooks and crannies and peculiarities that every school building has.

The floor plans and information about the school's construction, gathered as part of the information packet, are needed for this real test. The assistance of an architect is also important to developing alternatives which might require relocating walls and other renovations.

Using copies of the existing floor plans, trial plans should be made, based on the bubble diagram and adjacency information; intended uses of shared spaces; and program needs. These trial layouts should be discussed among representatives of potential users and programs. If major renovations are required for any of these plans the architect should provide an estimated cost, to be compared with financial resources available.

These aspects of "fit" should be determined by professionals -- architects familiar with state and local building and life safety codes, and the local building inspection department.

STRUCTURAL INTEGRITY

An architect should make a thorough assessment of any surplus school being seriously considered for reuse to determine the condition of the roof, structural elements, heating and electrical systems, plumbing, and windows and exterior shell. If repairs or improvements are needed to any of these, they should be known and their cost estimated as part of an overall assessment. (The school district may already have this information, which was perhaps considered in arriving at a decision to close the school.)

Under this category, consider improvements needed regardless of the specific layout being tested.

CODE COMPLIANCE

There are two reasons for checking into the school's compliance with legal codes for the reuse anticipated. First, codes change with time, so that an old building may not comply with current codes. Often, so long as the building continues in its original use, it does not have to be changed every time the code changes. It is "grandfathered" or exempted. However, change in use or major renovation may activate requirements that the building be upgraded to meet current standards.

Second, different regulations apply to building space depending on its use. Regulations regarding accessibility, fireproof construction, emergency exits, and other aspects of "life safety" for schools, often differ from requirements for other types of use.

Unlike the category for structural integrity, the need for change or renovation to comply with codes can be affected by different layout of space in the building. For example, placing areas of public assembly on the ground floor will probably require less building change than would placing such areas on the second floor. Therefore cost estimates for renovation for code compliance should be developed for each space layout being tested.

VII TESTING SPACE AFFORDABILITY: OPERATIONS AND MAINTENANCE COSTS

Operations and maintenance (O&M) costs are the bread and butter costs of using space. If a user cannot reliably, and relatively easily, afford to pay for O&M, then the space is too expensive.

If an arts group purchases a surplus school, it is clear that the group also assumes all the responsibilities and costs of building ownership, operation, and maintenance. Any group considering purchase must estimate the annual cost of the building, in addition to the purchase cost and cost of renovation. O&M costs for the most recent year of active use should be available from the school district. You will need to adjust for inflation and for the hours and months of the year you anticipate using the building.

When arts groups lease, borrow, or use space without assuming the full responsibilities of ownership, O&M costs are too often not adequately estimated. It is equally important to arts users of space and to building owners (represented by a reuse committee) to be sure that they understand the total O&M costs and how they will be covered. If utilities are to be covered through rent, then a building reuse committee needs to use these forms to determine what a breakeven rental fee would be. If utilities costs are to be covered directly by users, users need to know what they will pay, and a reuse committee should be interested in checking that potential tenants can afford to use the space.

When surplus space is rented instead of purchased, costs attributable to operations and maintenance and methods for covering them are often somewhat negotiable. Some portion of O&M may be provided "in kind." That is, no money changes hands or appears on the bookkeeping records. In surplus schools reused for the arts, the owner -- whether municipality or school district -- often covers some items of O&M. It may continue to pay for building insurance, or it may provide the services of a janitor, or maintain outdoor areas. Self-help by building users may also reduce operating costs. For example, if all users maintain their assigned spaces, only common area maintenance need be reflected in the building's O&M budget.

This section provides guidance in estimating total O&M costs for a school

building. If one organization or group is considering occupying a building, the total figure computed on Form VII.1 may be all that is needed to test the day-to-day affordability of the space.

However, the plan under consideration may include several organizations occupying space and contributing their fair share of O&M costs, or a single organization may want to test how well each potential program can support its use of space. The work sheets of Form VII.2 provide guidance for apportioning total O&M costs fairly among several users.

At an early stage of exploration, a simple dollar per square foot estimate is often used and multiplied by the size of space to be considered. Be careful, when using such an average figure, to understand what items are included and what assumptions are being made. Likewise, if the school was recently occupied, and a total O&M figure is available, be sure to know what items it covers.

For example, if a utilities figure assumes school operation for 6 hours/day, 5 days/week, 9 months/year, it would be very misleading to use that as an estimate for arts users that will keep the building open 10-12 hours/day, 6-7 days/week, and 12 months/year.

An early, accurate estimate of O&M costs is important for assessing the feasibility of a proposed use of space. The work sheet is an outline for determining how O&M costs will be covered and for estimating the costs. This work sheet can be used three different ways, depending on who is using it:

A) The arts organization considering buying a surplus school: Every item on this list is a real cost of building operation and you need to estimate the cost of each.

B) The school building reuse committee: Every item on this list has to be covered either "in kind" by the owner, as part of the rent, or out-of-pocket by the user, in addition to rent. In kind contributions by the owner are indirect subsidies and are sometimes swapped for services provided by the user. For example, the school district might continue to cover some O&M items in exchange for an artists cooperative providing arts enrichment to school children. Usually, rental fees are established to cover items that can be reliably estimated. Items which are highly unstable and/or whose costs may vary tremendously, depending on the level of building use, are usually assigned to the user. Utilities and custodial services are typical of user-covered O&M cost items. The reuse committee must evaluate each item, and determine whether it is to be covered by the user, donated in kind by the owner, or included in the basic rent. Specify the basis for cost estimates and the estimated dollar cost of each rent item. If the committee can also provide cost estimates for items to be covered by users, it will be helpful to groups that are considering using the space.

C) The arts organization considering leasing surplus school space: You need to identify which items are your responsibility, in addition to rent. For each item to be included in your operating and maintenance budget, specify the basis for cost estimates and the estimated dollar cost.

O&M ITEM	HOW WILL BE COVERED			ESTIMATE	
	Included in rent	Covered by owner	User's O&M	Basis for estimate	Cost estimate
UTILITIES					
Gas					
Electricity					
Oil					
Coal					
Water					
Sewer					
Other:					

O&M ITEM	HOW WILL BE COVERED			ESTIMATE	
	Included in rent	Covered by owner	User's O&M	Basis for estimate	Cost estimate
OPERATIONS AND MAINTENANCE PERSONNEL					
Janitors					
Craftsmen					
Other:					
CLEANING AND MAINTENANCE SUPPLIES — INDOORS AND OUTDOORS					
INSURANCE					
Fire					
Liability					
CONTRACT SERVICES					
SECURITY PERSONNEL AND SUPPLIES, IF ANY					

O&M ITEM	HOW WILL BE COVERED			ESTIMATE	
	Included in rent	Covered by owner	User's O&M	Basis for estimate	Cost estimate
BUILDING MANAGEMENT AND ADMINISTRATION					
RESERVE FUND FOR FUTURE REPAIRS (MAJOR AND MINOR)*					
AMORTIZED CAPITAL COSTS OF BUILDING ACQUISITION AND IMPROVEMENT **					

TOTAL AMOUNT TO BE COVERED BY RENTAL FEE $_____

TOTAL AMOUNT TO BE COVERED BY USER O&M $_____

*A reasonable reserve fund allocation would be 13% to 15% of current replacement cost. If this is not carried as an annual operating cost, assess your ability to raise money needed for emergencies and planned repairs from other sources.

**Annual payments on mortage loans for renovation and capital improvements, if any.

If the proposed arts reuse includes a patchwork of uses, programs, and organizations, each program or use may be required to pay its fair share of O&M costs. Estimating the cost which each component use or program would be expected to cover is necessary to test the affordability of one or more space allocation plans. The most common and logical approach is to relate the proportion of space used and the proportion of O&M cost owed.

APPROXIMATIONS

If the space is to be divided among only a few organizations or programs, they may be able to agree on a reasonable approximation of their respective uses and O&M responsibilities. For example, if two organizations planning to share a school agree that a 70%-30% split reasonably well reflects the space division, then they need make no further calculations.

CALCULATIONS

A rough guess approximation may not be adequate. There may be too many potential users and the space divisions may be too complex. Or you may simply want to create a more accurate way to test alternatives, or to account for variations in amount of use.

In this case, a room-by-room cost chart needs to be developed for every space in the school that will share in O&M. Before this chart can be created, however, the "effective square foot basis" must be established.

The "effective size" will never be the same as the total building size. It always excludes hallways, bathrooms, stairs, wall thicknesses, and other shared parts of the building that will not be "owned" by any user.

In the simplest variation, every usable room would be included and would share equally in carrying the O&M cost. Each room would carry 100% of its own cost and every room would have to be fully paid for by some user or program in order for the building's O&M costs to be covered.

Very often this simple version is just not workable. It leaves no room for maneuvering. If one room were vacant for three months, the O&M cost of the building for the year could not be met.

A very large space, such as an auditorium, might eventually attract enough use to "pay its full share," but probably couldn't realistically be expected to in the first three years. In order to allow for only partial use in those three years, and yet guarantee that the building's O&M costs will be covered, planners might estimate that the auditorium will bring in 30% of its "fair share." The real size of the auditorium would be multiplied by 30% to create a much smaller "effective size" for the room.

Some rooms may be anticipated to be so commonly used by all users — reception areas, a gallery, meeting rooms and administrative space — that they should not be included in the effective basis at all. The O&M cost attributable to these rooms would instead be shared by users of all other spaces.

Finally, to complete your conversion to thinking like a real estate developer, you might build in a "vacancy rate" or "uncertainty factor." For example, if you consider a 10% vacancy rate plausible, then you want 90% occupancy of the effective basis space to cover the full operating and maintenance cost of the building.

Form VII.2a is a work sheet for determining the effective square foot basis for the school building. That information is used in Form VII.2b to develop the chart listing the O&M cost for each room.

Once the chart has been created, it becomes easy to test the cost to a program or a user organization of numerous space allocation plans. Form VII.2c provides the basis for this testing.

School: _____

FULLY-USED SPACES OR ROOMS -- that will be charged 100% of O&M costs

List each room and its actual size in square feet that will be "charged" at full value to users:

Room	Size	Room	Size
_____	_____ SF	_____	_____ SF
_____	_____ SF	_____	_____ SF
_____	_____ SF	_____	_____ SF
_____	_____ SF	_____	_____ SF
_____	_____ SF	_____	_____ SF
_____	_____ SF	_____	_____ SF

Subtotal fully-used space _____ SF

PARTIALLY-USED SPACES OR ROOMS -- that will be charged <100% of O&M costs

List each room and its actual size that will be "charged" at partial value to users. List the percentage to be applied and compute the effective size of each room.

Room	Size	X	% *	=	Effective Size
_____	_____ SF		_____ %		_____ SF
_____	_____ SF		_____ %		_____ SF
_____	_____ SF		_____ %		_____ SF
_____	_____ SF		_____ %		_____ SF
_____	_____ SF		_____ %		_____ SF
_____	_____ SF		_____ %		_____ SF
_____	_____ SF		_____ %		_____ SF

Subtotal partially-used space _____ SF

* Proportion of full use assigned to this room.

APPLYING A VACANCY RATE

Add together the two subtotals:

Subtotal fully-used space	_____ SF
Subtotal partially-used space	_____ SF
TOTAL chargeable space	_____ SF
x Assumed occupancy level	_____ x %
TOTAL EFFECTIVE SIZE OF BUILDING	_____ SF

Divide the Total Cost of O&M (from Form VII.1) by the Total Effective Size: $_____ / _____SF =

EFFECTIVE O&M CHARGE PER SQUARE FOOT $_____/SF

For the record, identify all rooms that are assigned to carry no load for O&M:

WORK SHEET FOR DETERMINING OPERATION AND MAINTENANCE COST PER ROOM VII.2b
Single page

School: _____

Total Rent for the Building _____

Total O&M Cost Estimate for School (transfer from Form VII.1) _____

Total Effective Size of School (transfer from Form VII.2a) _____

O&M Cost/Effective Square Foot = _____

Transfer to this form each room that is to carry some load, and its effective size:

Room	Effective Size*	X	O&M Cost/Effect SF	=	O&M Room Cost**
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$
	SF		$		$

*To check, the sum of effective sizes should equal the Total Effective Size.

**To check, the sum of O&M room costs should equal the O&M Cost of Building.

Program or User Organization _____ School _____

FULL-TIME USE SPACE

Room	O&M cost of room
Subtotal	$

PART-TIME USE SPACE

Room	O&M cost of room	X	Program share	Program cost
			%	
			%	
			%	
			%	
			%	
			%	
			%	
			%	
			%	
			%	
			%	

TOTAL PROGRAM OR USER ORGANIZATION O&M COST $ _____

VIII SUMMARY OF SPACE EVALUATION

The one form in this section provides a concise way of evaluating how well one or more space alternatives meet the needs of a combination of programs under consideration.

If you're on the lookout for space -- as an individual artist, a community arts council, or an arts organization -- you need to compare your existing quarters with surplus school space opportunities that develop. This form provides a "tally sheet" of sorts for keeping track of alternatives.

Current space _____

#1 Alternative _____ #3 Alternative _____

#2 Alternative _____ #4 Alternative _____

LOCATION

List location criteria from Form III.1 and check off which alternatives meet them.

SPACE ALTERNATIVES

	Current	#1	#2	#3	#4
_____					
_____					
_____					
_____					
_____					
_____					
_____					

PROGRAMS

List programs you want to have from Form VI.3 and check off whether they can be successfully accommodated.

SPACE ALTERNATIVES

	Current	#1	#2	#3	#4
_____					
_____					
_____					
_____					
_____					
_____					
_____					

SIZE

"Ideal" amount of space you need: _____ SF

	SPACE ALTERNATIVES				
	Current	#1	#2	#3	#4
Size of space available	SF	SF	SF	SF	SF

SUITABILITY

In general, is the available space suitable to your needs and in a condition you are willing to work with?

	SPACE ALTERNATIVES				
	Current	#1	#2	#3	#4
Is space suitable?					

COST

Price range you can afford for one-time capital costs for purchase or renovation:

$_____

	SPACE ALTERNATIVES				
	Current	#1	#2	#3	#4
What are capital cost estimates?	$	$	$	$	$

Price range you can afford for annual costs: $_____

Total Cost: $_____ Per Sq Ft Cost: $_____

COSTS OF ALTERNATIVE SPACES

	SPACE ALTERNATIVES				
	Current	#1	#2	#3	#4
Annual Rent, if any	$	$	$	$	$
Annual O&M	$	$	$	$	$
Total Annual Cost	$	$	$	$	$
Total Annual Cost per SF	$	$	$	$	$

STABILITY AND FUTURE

Length of commitment you would prefer _____

	SPACE ALTERNATIVES				
	Current	#1	#2	#3	#4
Commitment required					

Check whether current space and alternatives provide space flexibility for expansion or contraction as needs change over the next three years:

	SPACE ALTERNATIVES				
	Current	#1	#2	#3	#4
Is space flexible?					

OTHER CONSIDERATIONS

List other criteria that are important to you in evaluating alternatives and current space, and rate how well each meets the criteria.

	SPACE ALTERNATIVES				
	Current	#1	#2	#3	#4
_____					
_____					
_____					
_____					
_____					
_____					
_____					

Special features--good or bad--to keep in mind.

Current space arrangements:

Space Alternative #1:

Space Alternative #2:

Space Alternative #3:

Space Alternative #4: